Required Report: Required - Public Distribution **Date:** December 19, 2025

Report Number: AR2025-0026

Report Name: Citrus Annual

Country: Argentina

Post: Buenos Aires

Report Category: Citrus

Prepared By: Mariana Prosperi

Approved By: William Verzani

Report Highlights:

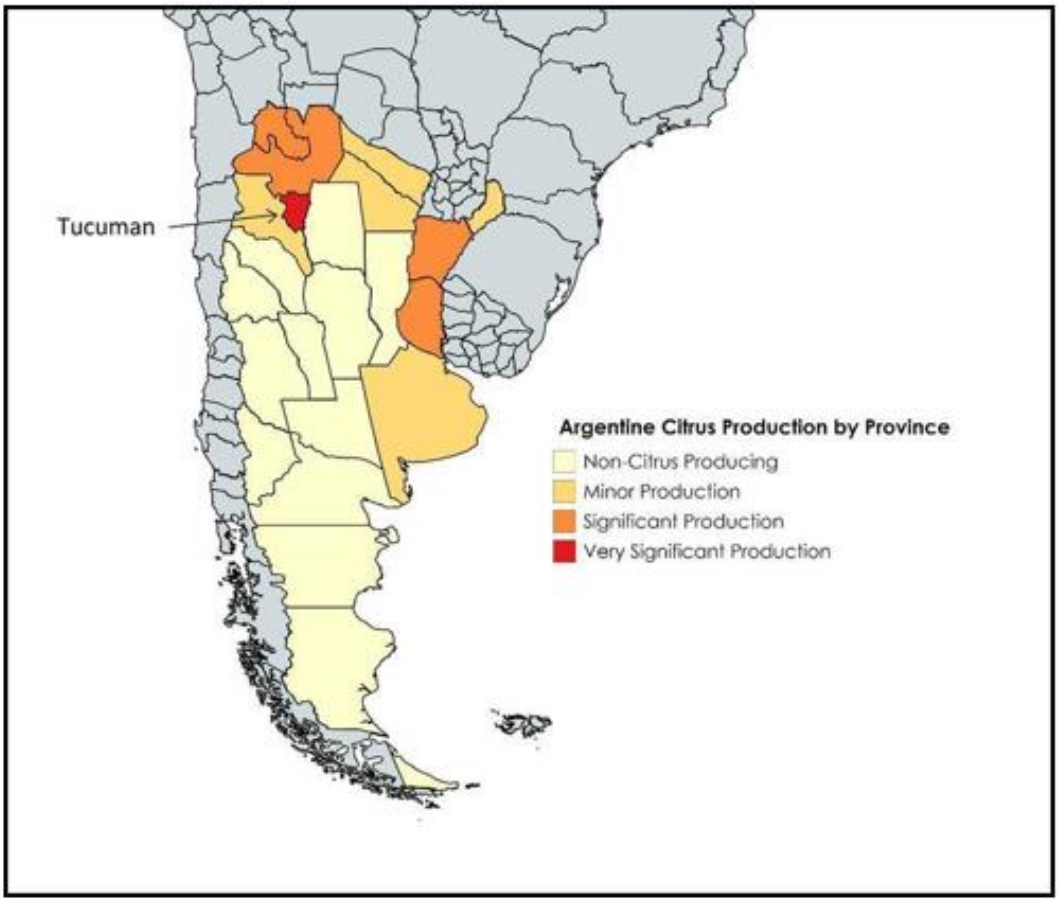
Argentina's lemon production in Marketing Year (MY) 2025/2026 is projected to remain steady at 1.9 million metric tons (MMT), supported by mild weather conditions throughout the growing cycle. Post has adjusted the MY 2024/2025 lemon production estimate significantly upward to 1.91 MMT, based on favorable climatic conditions that boosted yields. Fresh orange production in MY 2025/2026 is forecast at 680,000 MT, an 80,000 MT increase from the previous year. MY 2025/2026 tangerine output is expected to reach 240,000 MT, based on favorable weather. However, MY 2024/2025 tangerine production, which was affected by late-season frosts, has been adjusted down to 180,000 MT.

Production

Lemons are primarily grown in the northwest provinces of Argentina, which include Tucumán, Salta, and Jujuy, with some minor production in the northeastern region. The main lemon varieties cultivated include Eureka Frost, Lisboa Frost, Limoneira 8 A, and Génova EEAT. Tucumán, Salta, and Jujuy provide particularly favorable agroecological conditions for lemon production. The region combines a subtropical climate with warm days, mild nights, and reliable summer rainfall, supported by fertile alluvial soils and abundant water resources. These conditions promote vigorous vegetative growth, high fruit quality, and thick rinds, which are especially suitable for processing and export markets. Tucumán is the core producing area, accounting for roughly 80 percent of national lemon output, while Salta and Jujuy contribute complementary volumes from valleys with slightly cooler temperatures that extend the harvest window. The region's well-developed industry, characterized by modern orchards, concentrated processing capacity, and an experienced labor force, further reinforces its comparative advantage in global lemon production and exports.

Sweet citrus is grown in both the northwestern (oranges) and northeastern (oranges and tangerines) regions of Argentina. The main orange varieties grown in northwestern Argentina are Hamlin, Pineapple, Robertson, and Navel. In the northeast, the main varieties are Navel, Salustiana, and improved Valencia (Midnight, Delta Seedless). The main tangerine varieties are Clementina, Clemenvilla, Ellendale, Malvasio, Montenegrina, Murcott, and Ortanique. The expansion of sweet citrus includes seedless varieties such as Tango for oranges and Clementines and Clemenules for tangerines. The northeastern provinces of Entre Ríos, Corrientes, and Misiones are located in an area known for its humid subtropical climate and abundant natural resources. Warm temperatures, evenly distributed rainfall, and deep, well-drained soils create highly favorable growing conditions that support consistent yields and good fruit size, color, and sugar content. The region's microclimates, shaped by the Paraná and Uruguay river systems, help moderate temperature extremes and reduce the risk of frost, making it particularly well suited for sweet citrus varieties. Production is supported by long established orchards, specialized nurseries, and packinghouse infrastructure geared toward both domestic consumption and export markets. While the industry faces periodic challenges related to excess moisture and disease pressure, the region's natural conditions and technical know-how give it a strong comparative advantage for sweet citrus production.

Argentine Citrus Production by Province:



Source: FAS Buenos Aires, with data from the Secretariat of Agriculture, Livestock, and Fisheries

Lemons

The lemon production cycle in Argentina can be summarized in the following stages:

Stage	Months	Main tasks
Winter dormancy	Jun-Aug	Pruning, pest and disease control, fertilization, orchard maintenance
Blooming	Sep-Oct	Flowering and fruit set, pollination, frost and disease protection (mainly citrus canker and black spot)
Fruit development	Nov-Feb	Fruit growth, irrigation and nutrient management, pest control
Harvest	Mar-Aug	Manual harvest, sorting and transportation to packing houses or processing plants (for juice, oil, peel)
Postharvest	Apr-Sep	Washing, grading, waxing, packing, and export; maintenance of equipment and orchards after harvest

Post projects fresh lemon production for MY 2025/2026 to remain stable at 1.9 MMT due to favorable, frost-free weather conditions. For MY 2024/2025, Post has significantly increased its production estimate to 1.91 MMT as bloom damage due to early-season rainfall was much less than expected. Post also revised MY 2023/2024 production upward to 1.79 MMT, reflecting larger than anticipated fruit size and, therefore, an improved total output.

Over the past decade, the Argentine lemon sector has benefited from substantial investment in orchard renewal, improved production practices, and upgraded processing technology. Approximately 70 to 75 percent of national output is destined for the export processing industry, primarily for essential oils, frozen pulp, and dehydrated peel. Despite these improvements, the sector continues to face growing competition in international markets and persistent domestic economic pressures. Producers have been particularly affected by global oversupply and stagnant demand in the fresh citrus market, resulting in sustained downward pressure on prices over the last five years which has contributed to ongoing financial challenges across the lemon industry.

Oranges and Tangerines

The orange and tangerines production cycle in Argentina can be summarized in the following stages:

Stage	Months	Main Tasks
Winter dormancy	Jun-Aug	Pruning, fertilization, weed and pest control, orchard maintenance
Blooming	Sep-Oct	Flowering and fruit set, pollination, pest and disease monitoring (especially citrus canker and greening surveillance)
Fruit development	Nov-Mar	Fruit enlargement, irrigation and nutrient applications, pest and disease management (fruit fly, scale)
Harvest	May-Oct	Manual picking in several rounds, sorting, transportation to packing houses or juice plants
Postharvest	Jun-Nov	Washing, grading, waxing, and packing for export; pruning and field maintenance after harvest

Post estimates orange production for MY 2025/2026 to increase to 680,000 MT, supported by mild weather conditions and the absence of major climatic events during critical stages of fruit set and development. Estimates for MY 2024/2025 and MY 2023/2024 remain unchanged from USDA official data.

Tangerine production for MY 2025/2026 is projected at 240,000 MT while the MY 2024/2025 estimate is adjusted down to 180,000 MT. The sector expects to recover from the severe frost events that affected the previous year, which resulted in considerable crop losses and lower marketable volumes. Given the

favorable climatic pattern thus far, producers anticipate a more consistent harvest with better fruit quality, particularly in key producing provinces in Argentina's Northeast region.

Planted Area

Lemons

Post estimates MY 2025/2026 lemon planted area will remain at 45,000 hectares while harvested area is expected to slightly increase as producers, encouraged by improved market prices and stronger profitability expectations, bring previously abandoned orchards back into production. In addition, some aging or low-yielding trees were replaced with certified nursery stock, contributing to gradual orchard renewal and improved productivity. These adjustments reflect ongoing efforts by growers to optimize their production base and respond to evolving market conditions.

Oranges and Tangerines

The projected planted area for MY 2025/2026 and MY 2024/2025 remain unchanged for oranges and tangerines at 37,000 hectares and 27,500 hectares, respectively. There has been no significant investment in area expansion in recent years.

Challenges faced by smaller citrus producers in Argentina are becoming increasingly apparent, as they struggle to remain competitive in an evolving market. A clear trend has emerged where many of these small-scale growers are often choosing to sell their orchards to larger agricultural enterprises. This consolidation of land reflects the economic pressures and barriers that smaller producers encounter, ultimately leading to a concentration of citrus cultivation in the hands of larger, potentially more economically resilient farming operations.

In response to these challenges, some producers are adapting by shifting their focus to more profitable crops, such as yerba mate, or diversifying into other agricultural activities like livestock farming. This shift highlights the dynamic nature of the industry, with growers making strategic decisions to pursue alternative ventures that offer greater financial stability amid a changing economic landscape. Moreover, the citrus sector exhibits noticeable regional disparities, with growers in the northeast typically working with smaller plots compared to those in the northwest. These differences further complicate the ability of smaller producers to compete effectively, as labor costs increase and processing plants are outdated and require investment.

Investment

Rising production costs remain a primary constraint limiting the expansion of orchards in Argentina. Expenses for land, labor, and key production inputs, including fertilizers and pesticides, have increased substantially in recent years, reducing profitability for many producers. At the same time, producers are hesitant to invest as prices decline due to the global overproduction of lemons. Despite this, some of the larger lemon producers are actively replacing unproductive trees and investing in new genetic material to enhance yields. The newly replanted orchards also feature higher tree densities.

Private sector investments are directed towards enhancing efficiency in processing and packing facilities, irrigation systems, and various research and development projects. Moreover, citrus

producers have recently further increased their investments to align with protocols mandated by emerging export markets, including the United States and China. Additionally, efforts have been intensified to meet the European Union (EU) Citrus Black Spot (CBS) requirements, aimed at preventing any potential detection issues in the export process.

Consumption

Lemons

Argentine domestic fresh lemon consumption is expected to reach 201,000 MT in MY 2025/2026. Post revised domestic consumption estimates for MY 2024/2025 up to 221,000 MT. Over the past three years, per-capita lemon consumption in Argentina has remained relatively steady, reaching an estimated 6 kg per person in 2024. Consumption has shown resilience despite economic pressures and fluctuating supplies, supported by strong household use in cooking, beverages, and foodservice. Increased domestic availability in MY 2024/25, driven by higher production, contributed to slightly stronger consumption that year.

Oranges and Tangerines

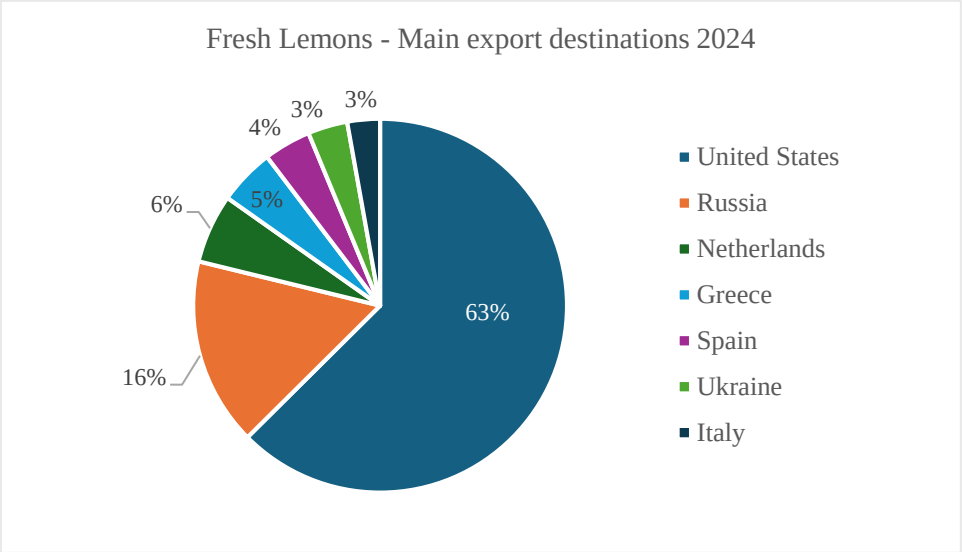
Domestic consumption of fresh oranges is forecast to increase to 400,000 MT in MY 2025/2026, in line with the slight production increase expected. Fresh tangerine domestic consumption is projected at 165,000 MT for MY 2025/2026. Estimates for MY 2024/2025 tangerine domestic consumption have been reduced due to lower production.

Per-capita consumption trends for sweet citrus show a mixed pattern. Orange consumption has been stable to slightly increasing, reaching an estimated 13.6 kg per person in 2024, supported by steady market supply and sustained consumer preference. On the other hand, per-capita tangerine consumption has declined modestly in recent years to approximately 4.6 kg per person. This contraction is linked primarily to reduced production and lower quality following late frosts, which limited marketable volumes in MY 2024/25.

Trade

Lemons

Forecasted fresh lemon exports in MY 2025/2026 stand at 210,000 MT. The main destination is expected to be the United States, followed by the European Union. The United States was one of the main destinations for Argentina’s fresh lemon exports in 2024, accounting for 63 percent of total shipments. Russia followed with 16 percent, reflecting its continued role as a key non-traditional destination. The Netherlands, Greece, and Spain represented smaller yet stable European markets, with shares of 6 percent, 5 percent, and 4 percent, respectively. Ukraine and Italy each captured 3 percent of export volumes. Argentina’s export profile continues to be highly concentrated, with the U.S. market driving most of the demand while secondary destinations provide additional diversification across Europe and Eastern Europe.



Source: FAS Buenos Aires based on Trade Data Monitor, LLC

Competitiveness of the lemon sector has been affected by significant production cost increases, such as for labor, inputs, and energy. South Africa has positioned itself as Argentina's main competitor in the European Union market, as their production and logistical costs are lower, according to contacts.

Argentina's National Service of Agri-Food Health and Quality (SENASA) introduced rigorous measures in 2023 to reduce the spread of Black Spot in citrus shipments for the European Union (EU). The Resolution 131/2023 mandates additional preventive treatments, including the use of strobilurins, for all citrus production units during the susceptibility period. This update extends treatments to all citrus varieties, such as oranges, mandarins, and grapefruits. Establishments with previous Black Spot detections are now required to apply strobilurins twice for export-bound produce. The resolution also increases sampling percentages for establishments with previous detections, emphasizing a comprehensive risk approach. Penalties for non-compliance, including exclusion from exporting citrus to the EU for a campaign period, remain unchanged.

After regaining market access to the United States in MY 2016/17, Argentina’s fresh lemon exports to the United States have exhibited a notable upward trend. Fresh lemon exports to the United States have expanded significantly over the past several years, consolidating the United States as Argentina’s leading fresh lemon market. For MY 2024/25, exports to the U.S. market peaked at 93,167 MT, reflecting strong United States demand, improved fruit quality, and favorable market conditions for Argentine suppliers.

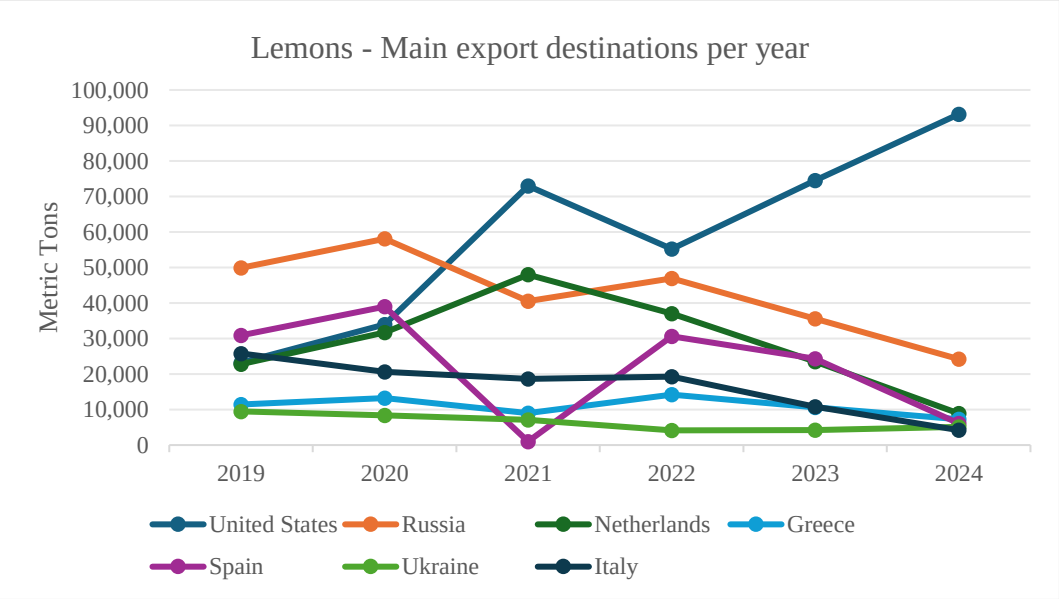
Within the region, Argentina has access to Brazil for all citrus fruits but faces competitive challenges in this market. In 2017, the Brazilian market for citrus fruits was reopened to Argentine exports after being closed for two years due to the detection of the citrus greening disease. However, the reopening of the market was accompanied by strict sanitary measures, which have made it more difficult for Argentina to export citrus fruits to Brazil.

Lemon Export Volume to the United States by Marketing Year

Marketing Year	Metric Tons
MY 2017/18	10,640
MY 2018/19	23,179
MY 2019/20	33,963
MY 2021/22	72,998
MY 2022/23	55,253
MY 2023/24	74,487
MY 2024/2025	93,167

Source: FAS Buenos Aires based on Trade Data Monitor, LLC

In July 2025, Chile established the phytosanitary requirements for the importation of fresh lemons from Argentina. This market opening follows more than 15 years of negotiations between the two countries, allowing Argentine lemons to enter the Chilean market provided they comply with a strict phytosanitary protocol. The opening of the Chilean market represents an important milestone for the citrus sector of Northwest Argentina (NOA), given Chile's geographic proximity, high per capita consumption of fresh lemons, and the advantage of duty-free access under the Mercosur–Chile Economic Agreement.



Source: FAS Buenos Aires based on Trade Data Monitor, LLC

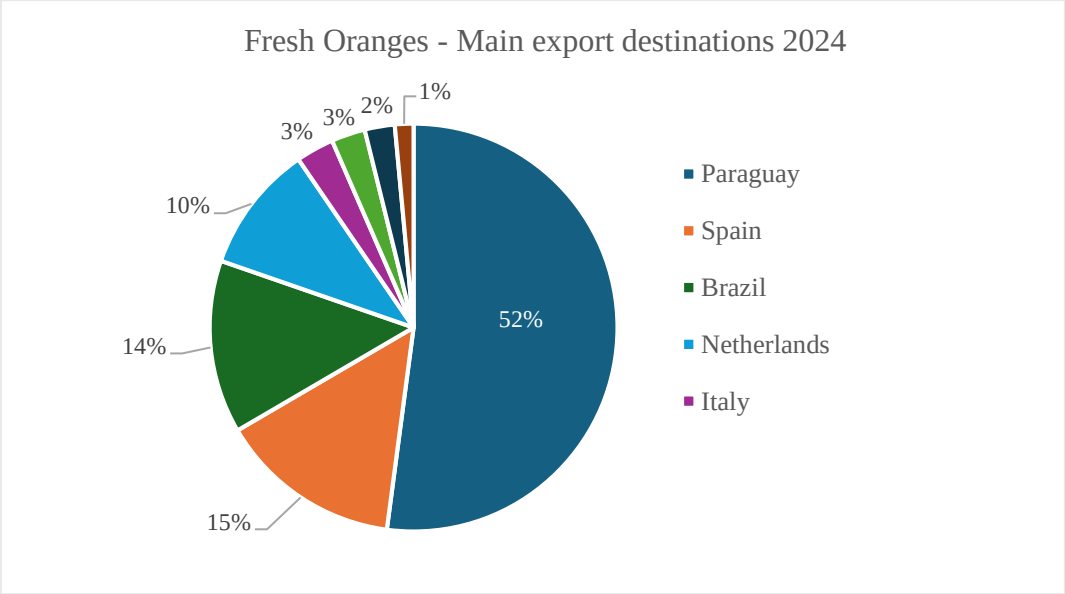
Argentina's lemon exports have shown a defined trend in market distribution over the past six years, with a growing concentration in the United States alongside declining sales to traditional destinations such as Russia and parts of the European Union. The United States has become Argentina's most dynamic market, with volumes rising sharply since 2021 and reaching record levels in 2024, reflecting strong counter-season demand and Argentina's improved access and compliance with United States phytosanitary requirements. On the other hand, shipments to Russia have steadily decreased from their 2019 peak, constrained by economic instability and logistics challenges, while exports to Ukraine

dropped significantly following the onset of the 2022 conflict. EU-bound volumes, particularly to the Netherlands, Spain, and Italy, have exhibited considerable year-to-year volatility driven by variable domestic EU production, evolving import requirements, and increased competition from other suppliers, such as South Africa. Argentina's lemon export sector is becoming more dependent on the United States market while facing a more uncertain and competitive landscape in Europe and Asia.

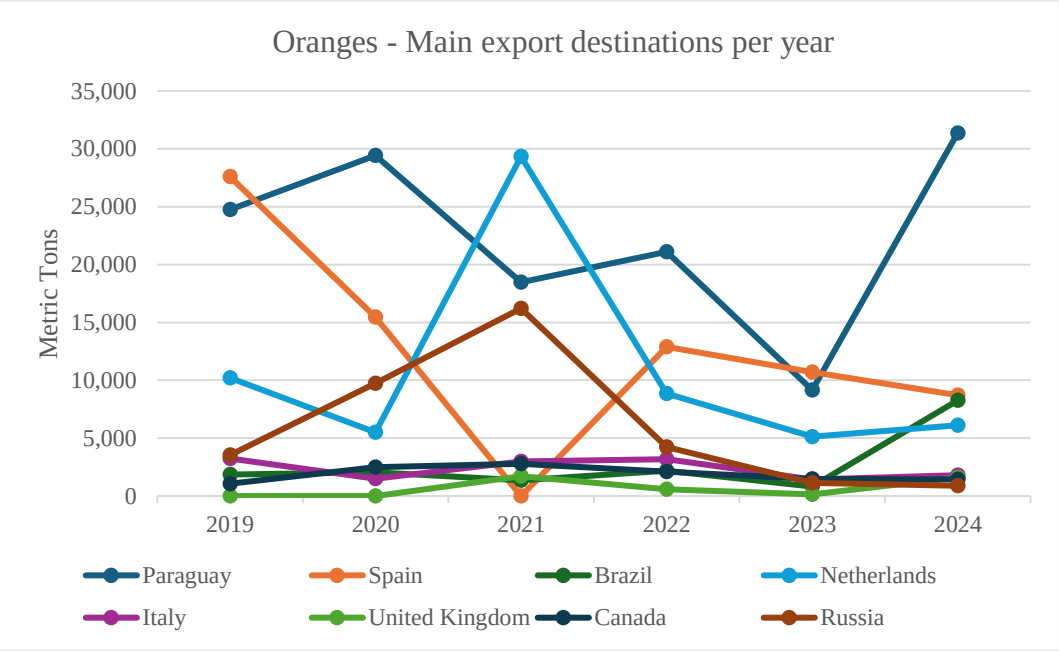
Oranges and tangerines

For MY 2025/2026, fresh orange exports are expected to slightly decrease, reaching a total of 45,000 MT. MY 2025/2026 tangerine exports are forecast slightly up at 25,000 MT. Fresh orange and fresh tangerine exports from Argentina remain unchanged for MY 2024/2025.

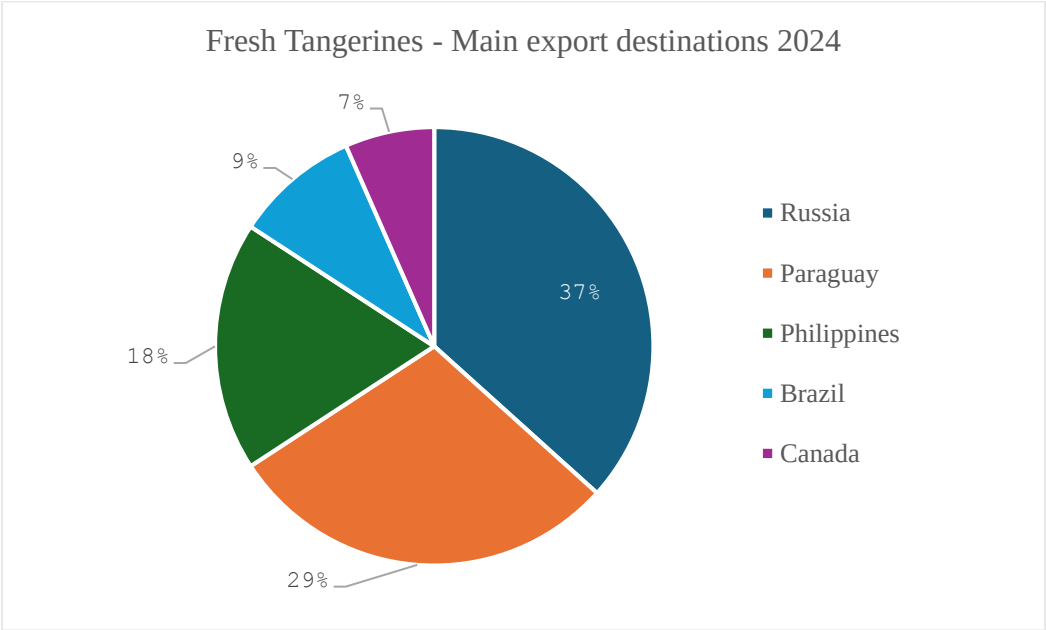
In 2024, Paraguay was the largest destination for Argentine fresh orange exports, accounting for 52 percent of total shipments. Spain and Brazil followed as significant markets, accounting for 15 percent, and 14 percent respectively. Meanwhile, the Netherlands accounted for 10 percent of exports. Paraguay and neighboring countries dominate Argentina's fresh orange exports, while European destinations continue to represent an important, though smaller, share of the market.



Source: FAS Buenos Aires based on Trade Data Monitor, LLC

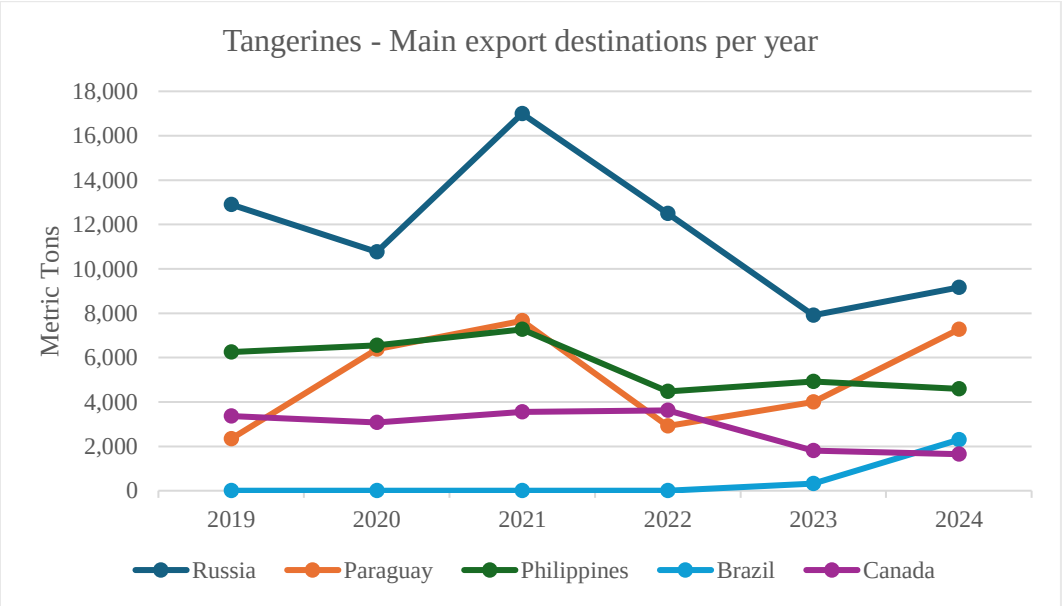


Argentina's orange export patterns from 2019 to 2024 highlight a highly volatile market structure, with sharp fluctuations across nearly all major destinations. Exports to Spain, historically a key buyer, declined significantly after 2019, reflecting reduced EU demand and competition from lower-cost suppliers. Russia showed intermittent spikes, most notably in 2021, but volumes dropped sharply after the onset of the 2022 conflict, mirroring the pattern seen in other Argentine citrus categories. Paraguay and Brazil maintained relatively stable but modest purchases, serving as reliable regional markets. On the other hand, shipments to the Netherlands, Canada, and the United Kingdom were more erratic, driven largely by shifts in Argentina's exportable supply, variable Northern Hemisphere production, and tightening EU and UK phytosanitary requirements.



Source: FAS Buenos Aires based on Trade Data Monitor, LLC

Argentine tangerines have a strong presence in both regional and distant markets, with Russia and Paraguay accounting for nearly two thirds of the exported volume. In 2024, Russia was the leading destination for Argentine fresh tangerine exports, accounting for 37 percent of total shipments. Paraguay followed as the second largest market with 29 percent, while the Philippines represented 18 percent of exports. Brazil and Canada were smaller destinations, comprising 9 percent and 7 percent of total exports, respectively.



Russia remained as the primary destination for tangerine exports through 2024, peaking in 2021 before declining sharply in 2022 and 2023 in connection with geopolitical and logistical disruptions. Paraguay and Brazil, Argentina's closest regional markets, show moderate and steady growth, indicating resilient demand within South America and fewer phytosanitary and logistical barriers. While Argentina retains a core base of reliable regional buyers, its ability to expand tangerine exports to more distant or high-value markets remains limited by production variability, freight costs, and market access constraints.

Policy and trade agreements

Argentina applies a range of tariffs, taxes, and rebates on citrus trade under its current import and export regime. Imports of citrus fruit from outside Mercosur are subject to a 10 percent tariff, in addition to a 10.5 percent advance value-added tax (VAT) and a 3 percent statistical tax. Domestic sales are subject to the standard 21 percent VAT. On the export side, citrus shipments face no export tax, while bulk exports receive a 1 percent export rebate, which provides a modest incentive for exporters.

Tariffs, taxes, & rebates for all citrus fruit.

Tariffs, taxes, & rebates for all citrus fruit	
(HTS codes: 080510, 080521, 080522, 080529, 080550)	percent
Import Tariff (outside Mercosur)	10.00
Advance Value-added Tax	10.5
Statistical Tax	3.00
Value-added Tax	21
Export Tax	0.00
Export Rebate (bulk) (*)	1.00

Source: FAS Buenos Aires based on Tarifar. (*) The export rebate applies equally within and outside Mercosur

An announcement of a trade agreement between the United States and Argentina was made in November 2025, which could have implications for Argentina's citrus sector. The announced agreement includes tariff-relief measures designed to enhance the competitiveness of regional agricultural exports. Reduced tariffs could improve the price competitiveness of Argentine citrus in the U.S. market, potentially supporting higher export volumes and better margins for producers and processors.

In June 2023, after more than 20 years, the EU approved the shipment of all Argentine organic citrus treated post-harvest with sodium bicarbonate. This approval marks an expansion to include sweet citrus from the previous authorization which was restricted solely to organic lemons. The decision by European authorities heralds a positive impact on the production of organic citrus fruits in Argentina, where approximately 4,500 hectares are currently cultivated under these conditions, as per Argentina's official estimations for 2025.

In November 2024, Argentina, as part of the Mercosur, signed the Mercosur-European Union (EU) trade agreement. The agreement is a significant trade deal signed between Mercosur (Argentina, Brazil, Paraguay, and Uruguay) and the European Union. This agreement, which has been in the works for over two decades, aims to enhance economic ties between the two regions by reducing trade barriers, such as tariffs and quotas, and increasing access to markets for a wide range of goods and services. One of the most immediate benefits of the EU-Mercosur agreement for Argentina's citrus sector is increased access to the European market. With tariff reductions and more favorable terms, Argentine citrus producers (especially lemons and oranges) will have a better opportunity to expand exports to the EU, one of the world's largest markets for fresh fruit.

While Argentina stands to benefit from reductions, competition will likely increase as other countries (especially from within the EU's trade network) may also benefit from the trade agreement. This means that Argentine citrus growers will face stronger competition from other exporters to the European market, particularly in pricing and quality standards. South Africa, for instance, has long been a key competitor for Argentina in the EU citrus market. The trade agreement could open the EU market even further to South African citrus, which could impact Argentina's market share.

Imports

Post estimates lemon imports will remain stable at 1,000 MT in MY 2025/2026, unchanged from the previous year. Chile continues to be the primary supplier, accounting for most shipments.
Orange imports are projected to reach 2,000 MT in MY 2025/2026, with Egypt maintaining its position as the leading source. For tangerines, Post expects imports to also remain negligible in MY 2025/2026.

Phytosanitary Issues

Citrus Greening: Huanglongbing (HLB)

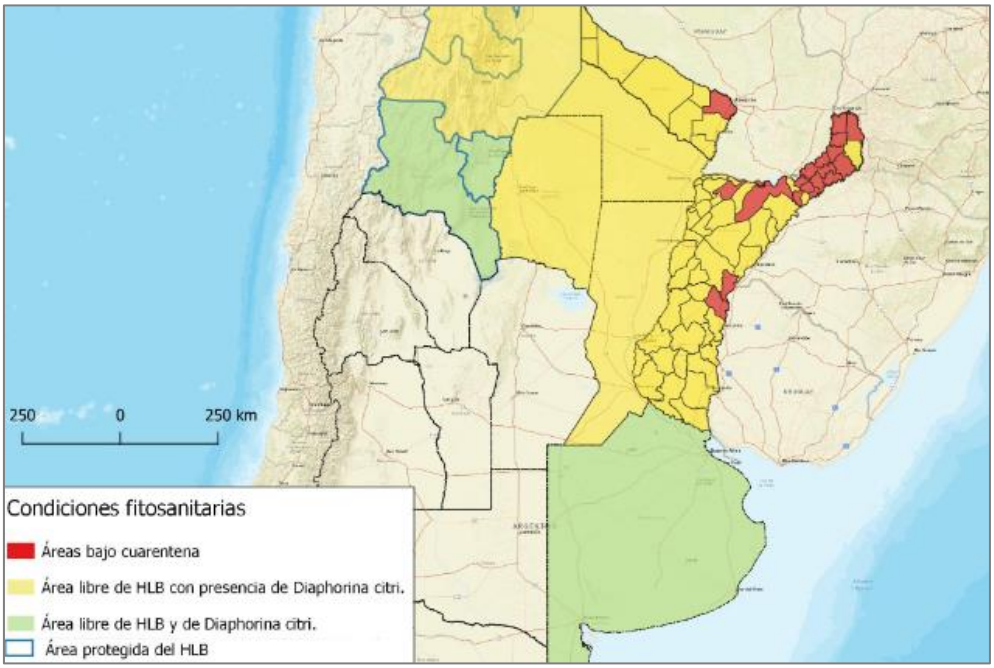
Citrus Greening, or Huanglongbing (HLB), is one of the most destructive citrus diseases worldwide. It is caused by the bacterium Candidatus Liberibacter spp., which is transmitted primarily by the Asian citrus psyllid (Diaphorina citri). Infected trees show leaf yellowing, fruit deformation, poor coloration, reduced yields, and eventually decline and death. There is currently no cure for HLB, and management relies on vector control, removal of infected trees, and the use of certified disease-free planting material. Because of its severe economic impact and rapid spread, HLB is considered a top phytosanitary threat in all major citrus-producing countries.

HLB has been detected only sporadically in Argentina, and the government has implemented strict containment and monitoring measures under the National HLB Prevention Program. In July 2014, a non-commercial case was identified in Mocoretá, Corrientes Province, near the Uruguay border; no additional detections were found following intensified surveillance. The program operates under Secretariat of Agriculture Resolution No. 517/2009, National Law No. 26.888/2013, and SENASA Resolution No. 336/2014.

Earlier, in July 2012, APHIS had been notified of an HLB detection in a single tangerine tree in Puerto Deseado, Misiones Province, near Brazil. The tree was destroyed, and SENASA carried out extensive sampling in 150 surrounding premises, all of which tested negative for both HLB and the vector Diaphorina citri. Given the area's non-commercial status and proximity to national parks, SENASA indicated the introduction was likely illegal. While subsequent detections of the vector occurred in Misiones and Corrientes, and in 2016 for the first time in commercial citrus areas, the disease itself remained limited.

To reinforce prevention efforts, the Ministry of Agroindustry and FEDERCITRUS signed a cooperation agreement in 2017, followed in 2019 by a resource-support agreement among SENASA, FONDAGRO, and AFINOA. In 2020, SENASA updated the national program and established new quarantine zones under Resolution No. 875/2020 in response to expanded vector presence. In Entre Ríos, HLB was first confirmed in Diaphorina citri in 2017, with plant infections verified in eradicated trees the following year, prompting implementation of a regional contingency plan.

Phytosanitary condition of HLB in Argentina:



Source: SENASA

In the above chart, SENASA has defined the following areas based on HLB presence or absence, as follows:

- Red: areas under HLB quarantine, including Corrientes (some departments); Misiones (some departments), Entre Ríos (Federación), and Formosa (some departments).
- Yellow: area free of HLB with presence of vector Diaphorina citri, which include Jujuy, Salta, Santa Fe, Chaco, Misiones, Entre Ríos (some departments), Corrientes, Formosa, and Santiago del Estero.
- Green: area free of HLB and/or the vector Diaphorina citri, including Buenos Aires, Catamarca, and Tucuman.
- White: protected area from HLB, which includes the Northwest Argentina (NOA) region.

Currently, SENASA operates a network of approximately 400 trapping sites across the country for the early detection of the HLB vector insect. These traps undergo inspection every 15 or 30 days, depending on their specific installation conditions. They serve as an additional tool focused on the early detection of the vector insect in areas where it is currently absent.

For additional information on HLB in Argentina you can visit:
https://www.argentina.gob.ar/senasa/micrositios/hlb

Marketing

International (FOB) prices for fresh citrus fruit:

Argentine export prices for Lemons

US$/MT	2023	2024	2025
Jan	571	557	0
Feb	495	592	0
Mar	532	561	526
Apr	569	545	624
May	562	571	639
Jun	558	582	672
Jul	563	598	676
Aug	582	574	652
Sep	515	554	572
Oct	313	0	--
Nov	548	0	--
Dec	432	0	--
Average	520	428	485

Source: FAS Buenos Aires based on Trade Data Monitor, LLC

FOB prices for fresh Argentine lemons show relatively stable trends in 2023 and 2024, with monthly values ranging between $500 and $600 per MT, during the peak export season from March to September. 2025 prices display a marked increase, with levels consistently above previous years and reaching $650 to $680 per MT between May and July, following stronger international demand and improved market conditions for Argentine lemons in 2025.

Argentine export prices for Oranges

US$/MT	2023	2024	2025
Jan	66	49	40
Feb	51	56	43
Mar	50	56	55
Apr	41	47	55
May	107	94	198
Jun	306	227	350
Jul	603	498	618
Aug	579	366	625
Sep	390	321	481
Oct	388	261	--
Nov	124	208	--
Dec	72	77	--
Average	231	188	274

Source: FAS Buenos Aires based on Trade Data Monitor, LLC

FOB prices for fresh oranges from Argentina show a pronounced seasonal pattern across all three years, with minimal export activity and low-price levels during the first months of the year, followed by a sharp increase as the marketing season progresses. Prices in 2023 and 2024 remain broadly aligned, rising steadily from May and peaking in July to August at approximately USD 550–600/MT. In 2025, however, prices consistently exceed those of the previous years, reaching highs above USD 600/MT during July and August, following stronger export demand in that season. By September and October, prices begin to decline across all years as the marketing window closes.

Argentine export prices for Tangerines

US$/MT	2023	2024	2025
Jan	0	0	0
Feb	0	0	0
Mar	0	0	0
Apr	667	0	581
May	597	555	747
Jun	617	621	748
Jul	648	642	615
Aug	575	557	617
Sep	456	393	526
Oct	83	300	--
Nov	160	125	--
Dec	0	211	--
Average	745	284	426

Source: FAS Buenos Aires based on Trade Data Monitor, LLC

FOB prices for fresh Argentine tangerines show clear seasonal behavior, with export activity concentrated between April and September. Prices in 2023 and 2024 follow similar trajectories, beginning at relatively high levels in April around USD 650-670/MT, and gradually declining through the end of the season. In 2025, however, prices are consistently higher than in the previous two years, particularly in May and June, when they exceed USD 700/MT. From September to October, prices drop sharply throughout all years as export volumes decrease.

Early December 2025 retail prices of Argentine citrus (US$/kg):

Fresh Citrus Fruit		***US$/kg***
Lemon	Eureka	2.20
	Genova	2.07
Orange	Valencia (Standard)	0.62
	Valencia (Premium)	0.90
	Navel (Standard)	2.07
	Navel (Premium)	2.76
Tangerine	Okitsu	2.22

	Murcot	2.07
	Criolla	2.22

Source: Survey of supermarkets and grocery stores in the city of Buenos Aires
Note: Official rate as of December1, 2025, US$ 1 = ARS$ 1,450

Early December 2025 wholesale prices of Argentine citrus (US$/kg):

Fresh Citrus Fruit		***US$/kg***
Lemon	Eureka	1.42
	Genova	1.15
Orange	Valencia (Standard)	0.48
	Valencia (Premium)	0.5
	Navel (Standard)	0.84
	Navel (Premium)	1.22
Tangerine	Okitsu	1.5
	Murcot	1.23
	Criolla	1.5

Source: Mercado central of Buenos Aires, Argentina.
Note: Official rate as of December1, 2025, US$ 1 = ARS$ 1,450

Production, Supply, and Demand Statistical Tables

Lemons/Limes, Fresh	**2023/2024**		**2024/2025**		**2025/2026**	
Market Year Begins	**Jan 2024**		**Jan 2025**		**Jan 2026**	
Argentina	**USDA Official**	**New Post**	**USDA Official**	**New Post**	**USDA Official**	**New Post**
Area Planted (HECTARES)	50000	50000	45000	45000	0	45000
Area Harvested (HECTARES)	45000	45000	41000	41000	0	43000
Bearing Trees (1000 TREES)	10000	10000	9500	9500	0	9600
Non-Bearing Trees (1000 TREES)	750	750	700	700	0	700
Total No. Of Trees (1000 TREES)	10750	10750	10200	10200	0	10300
Production (1000 MT)	1450	1787	1380	1910	0	1900
Imports (1000 MT)	1	1	1	1	0	1
Total Supply (1000 MT)	1451	1788	1381	1911	0	1901
Exports (1000 MT)	170	172	165	190	0	210
Fresh Dom. Consumption (1000 MT)	149	200	126	221	0	201
For Processing (1000 MT)	1132	1416	1090	1500	0	1490
Total Distribution (1000 MT)	1451	1788	1381	1911	0	1901
(HECTARES) ,(1000 TREES) ,(1000 MT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Oranges, Fresh	2023/2024		2024/2025		2025/2026	
Market Year Begins	Jan 2024		Jan 2025		Jan 2026	
Argentina	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HECTARES)	37000	37000	37000	37000	0	37000
Area Harvested (HECTARES)	33300	33300	33300	33300	0	33300
Bearing Trees (1000 TREES)	16500	16500	16500	16500	0	16500
Non-Bearing Trees (1000 TREES)	1400	1400	1400	1400	0	1400
Total No. Of Trees (1000 TREES)	17900	17900	17900	17900	0	17900
Production (1000 MT)	760	760	620	620	0	680
Imports (1000 MT)	3	3	2	2	0	2
Total Supply (1000 MT)	763	763	622	622	0	682
Exports (1000 MT)	62	62	52	52	0	45
Fresh Dom. Consumption (1000 MT)	470	470	350	350	0	400
For Processing (1000 MT)	231	231	220	220	0	237
Total Distribution (1000 MT)	763	763	622	622	0	682
(HECTARES) ,(1000 TREES) ,(1000 MT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Tangerines/Mandarins, Fresh	2023/2024		2024/2025		2025/2026	
Market Year Begins	Jan 2024		Jan 2025		Jan 2026	
Argentina	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HECTARES)	27500	27500	27500	27500	0	27500
Area Harvested (HECTARES)	22500	22500	22500	22500	0	22500
Bearing Trees (1000 TREES)	12600	12600	12600	12600	0	12600
Non-Bearing Trees (1000 TREES)	1350	1350	1350	1350	0	0
Total No. Of Trees (1000 TREES)	13950	13950	13950	13950	0	12600
Production (1000 MT)	280	280	200	180	0	240
Imports (1000 MT)	1	1	1	1	0	0
Total Supply (1000 MT)	281	281	201	181	0	240
Exports (1000 MT)	34	34	20	20	0	25
Fresh Dom. Consumption (1000 MT)	197	197	141	121	0	165
For Processing (1000 MT)	50	50	40	40	0	50
Total Distribution (1000 MT)	281	281	201	181	0	240
(HECTARES) ,(1000 TREES) ,(1000 MT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Attachments:

No Attachments

Attachments:

No Attachments